

**QUARTERLY CONTRACT MONITORING REPORT (QCMR)
CLIENT MOVEMENT REPORT
SYSTEMS ADVOCACY LEGAL SERVICES**

USTF PROJECT CODE: _____		REPORTING QUARTER: (CHECK ONE)	
NAME OF AGENCY: _____		JULY 1 TO SEPTEMBER 30	1. _____
NAME OF PROGRAM: _____		OCTOBER 1 TO DECEMBER 31	2. _____
PERSON COMPLETING FORM/	PHONE#	JANUARY 1 TO MARCH 31	3. _____
DATE SUBMITTED: _____		APRIL 1 TO JUNE 30	4. _____
CHECK AGENCY REPORTING QUARTER:		1. _____	2. _____
		3. _____	4. _____

1. _____	2. _____	3. _____	4. _____	5. _____	6. _____
Beginning Active Caseload (First Day of Quarter)	New Enrollees to Program Element During Qtr.	Transfers to Program Element During Quarter	Transfers From Program Element During Qtr.	Terminations From Program Element During Qtr.	Ending Active Caseload (Last Day of Quarter)

TARGET GROUPS	7. Number of Target Group Members:	
	NEW ENROLLEES	TRANSFERS
7A. Clients who were Discharged from State Hospitals and Enrolled in this Program within 30 days of Discharge.	_____	_____
7B. Clients who were Discharged from County Hospitals and Enrolled in this Program within 30 days of Discharge.	_____	_____
7C. Clients who were Discharged from a Short-Term Care Facility/Involuntary Psychiatric Unit and Enrolled in this Program within 30 days of Discharge.	_____	_____
7D. Clients who were Discharged from an other Hospital and Enrolled in this Program within 30 days of Discharge.	_____	_____

Definitions of Terms are on the Back

CLIENT MOVEMENT REPORT

- 1. BEGINNING ACTIVE CASELOAD:** Refers to clients who have had at least one face-to-face contact with your agency in the last 90 days and were active on the last day of the previous quarter. **The Beginning Caseload equals the Ending Caseload of the previous reporting period.**
- 2. NEW ENROLLEES:** Clients who were newly enrolled in your agency during the reporting quarter and were enrolled in this program element prior to enrollment in any other program element within your agency.
- 3. TRANSFERS TO:** Refers to clients who are already registered within your agency in another program element, and are being transferred to this program element.
- 4. TERMINATIONS:** Clients who are no longer receiving services at your agency.
- 5. ENDING ACTIVE CASELOAD:** Is the active caseload on the last day of the reporting quarter.

Calculate as follows:

ADD: #1 (Beginning Active Caseload) + #2 (New Enrollees) + #3 (Transfers To).

THEN SUBTRACT: #4 (Transfers From) and #5 (Terminations) = Ending Active Caseload.

DUPLICATED COUNT OF TARGET GROUP MEMBERS AMONG "NEW ENROLLEES" AND "TRANSFERS TO": Refers to the count of clients who entered this program element within 30 days of their discharge from the hospital. The definitions of "New Enrollees" and "Transfers To" are the same as stated above. The number of "New Enrollees" or "Transfers To" indicated in categories 7A, 7B, 7C, and 7D should be the same or less than the number indicated in items #2 and #3 of this form.

- 7A. STATE HOSPITALS:** Refers to 5 psychiatric hospitals located in New Jersey only: Greystone Park, Trenton, Ancora, Hagedorn, and Forensic.
- 7B. COUNTY HOSPITALS:** Refers to the five county hospitals located in New Jersey only: Burlington, Camden, Essex, Hudson, and Bergen.
- 7C. SHORT-TERM CARE FACILITIES:** Refers to inpatient, community-based mental health treatment facilities designated by DMHS, which provide acute care and assessment services to the mentally ill.
- 7D. OTHER HOSPITALS:** Refers to any psychiatric hospital or psychiatric unit within a hospital that is not a State, County or STCF Hospital in New Jersey; include as "Other" any facility located outside of New Jersey.

**QUARTERLY CONTRACT MONITORING REPORT (QCMR)
LEVEL OF SERVICE REPORT
SYSTEMS ADVOCACY LEGAL SERVICES**

USTF PROJECT CODE: _____		REPORTING QUARTER: (CHECK ONE)	
NAME OF AGENCY: _____		JULY 1 TO SEPTEMBER 30	1 _____
NAME OF PROGRAM: _____		OCTOBER 1 TO DECEMBER 31	2 _____
PERSON COMPLETING FORM/ _____	PHONE# _____	JANUARY 1 TO MARCH 31	3 _____
DATE SUBMITTED: _____		APRIL 1 TO JUNE 30	4 _____
CHECK AGENCY REPORTING QUARTER:		1 _____	2 _____
		3 _____	4 _____

1. AVERAGE CASELOAD: A. Per Advocate _____ B. Per Attorney _____

2. NUMBER OF STAFF CONTACTS: LEGAL STAFF ADVOCACY STAFF

A. Face-to-Face with Client	A. _____	A. _____
B. Telephone with Client	B. _____	B. _____
C. Collateral	C. _____	C. _____

3. NUMBER OF NEW SOCIAL SECURITY CASES ACCEPTED BY REFERRAL SOURCE:

A. State/County Hospitals (Total)	A. _____
B. State/County Hospitals (Denials Only)	B. _____
C. DMHS Residential Programs	C. _____
D. All Others	D. _____

4. NUMBER OF NEW ENTITLEMENT EPISODES:

A. Social Security Eligibility Cases	A. _____
B. Social Security Continuing Cases	B. _____
C. Other Eligibility Cases	C. _____
D. Other Continuing Cases	D. _____

5. NUMBER OF NEW NON-ENTITLEMENT EPISODES INVOLVING:

A. Housing Issues	A. _____
B. Consumer Issues	B. _____
C. Family Issues	C. _____
D. Other Issues	D. _____

6. ENTITLEMENT CASES OUTCOMES: FAVORABLE UNFAVORABLE

A. Social Security Eligibility Cases	A. _____	A. _____
B. Social Security Continuing Cases	B. _____	B. _____
C. Other Entitlement Eligibility Cases	C. _____	C. _____
D. Other Entitlement Continuing Cases	D. _____	D. _____
E. Entitlement Case Moot Outcomes	E. _____	

Definitions of Terms are on the Back.

SYSTEMS ADVOCACY LEGAL SERVICES

Legal assistance provided to mental health clients, either through agency referrals or self-referral. Assistance may include advice and guidance, case coordination and advocacy, and court representation for issues such as government entitlements, housing, evictions, employment, etc.

- 1. AVERAGE CASELOAD:** Average caseload will be reported by a “full-time equivalent” direct service level. This is determined by assessing the amount of time devoted to direct client services exclusive of supervisory and broad systems advocacy activities.
- 2. NUMBER OF STAFF CONTACTS:** Refers to the number of contacts with a client or on behalf of a specific client provided by an attorney or advocate. The three categories indicated are mutually exclusive and exhaustive.
- 3. Self Explanatory.**
- 4. NEW ENTITLEMENT EPISODES:** Includes all new cases that were initiated during the quarter. The episodes can include either an issue defined at intake of a new client or an entitlement issue that arises during the course of services to an active client initially enrolled for an unrelated legal problem.

The four categories include all financial entitlements available to clients with social security cases identified separately and the status of the client in regards to the entitlement specified. Entitlement Cases will include only those cases in which the eligibility for entitlement is at stake. Therefore, clients in this category either are not receiving the indicated entitlement or are threatened with its termination. Continuing Cases are all cases that are related to the receipt of entitlements, including issues of recoupment of overpayment, reduction of benefits, and other impediments related to the receipt or use of entitlements.
- 5. NEW NON-ENTITLEMENT EPISODES:** Include all new cases that were initiated during the quarter. An episode can include either a non-entitlement issue identified at intake of a new client or a non-entitlement issue that arises during the course of services to an active client.
- 6. ENTITLEMENT CASES OUTCOMES:** Indicates the terminal outcomes received during the reporting period of entitlement cases in each of the four categories. Terminal outcomes are those which will be pursued no further. Therefore, do not report any unfavorable decision or adverse action which will be appealed. Most outcomes are cases for which no substantive outcome has been achieved. This category includes cases not pursued because of loss of contact with a client, client non-cooperation, the institutionalization of a client, etc.